agenTel 6.1
Product Description

www.voxtron.com/agentel

Document Information

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Product	:	agenTel 6.1

Introduction

AgenTel is a software-based contact center solution that offers you the opportunity to use contact center technology in a cost-efficient way.

AgenTel handles your incoming calls, emails and faxes 24 hours a day, 7 days a week and routes them to the most appropriate agent depending on the needs of your customers and the skills of the agents.

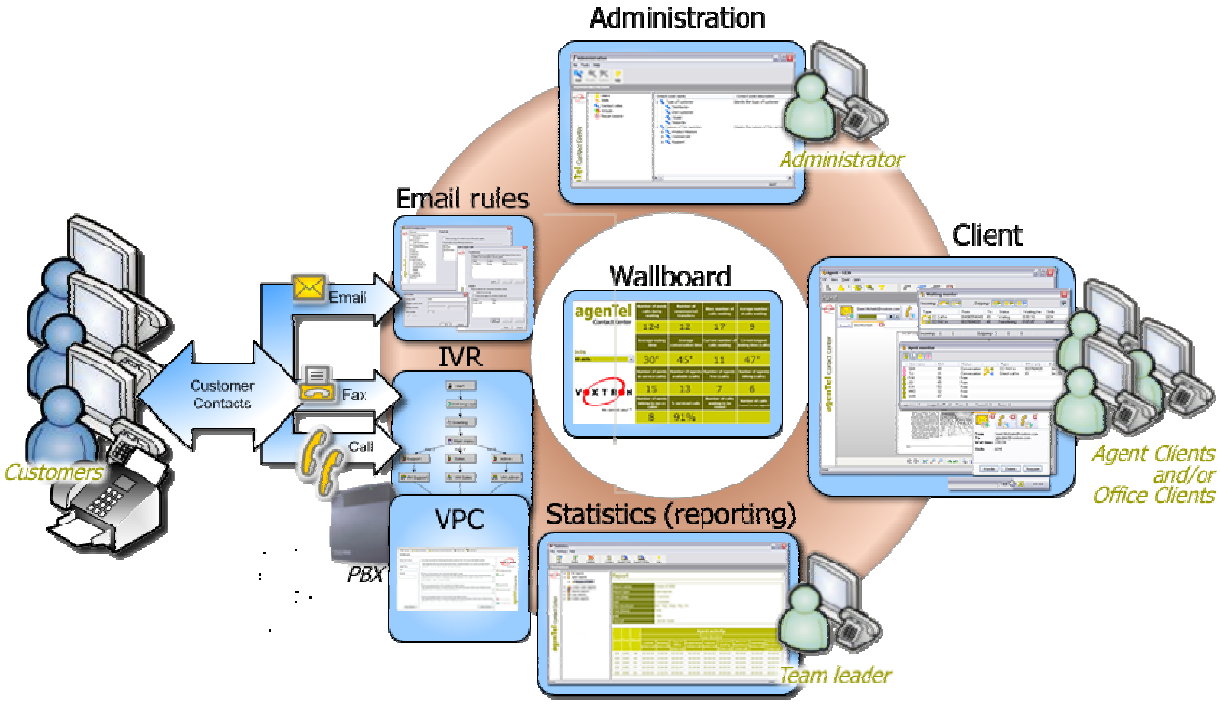
AgenTel's outbound campaigns feature is great for organizing marketing campaign s or maybe you simply want to contact your customers to get their feedback? Count on agenTel to keep track of all your incoming calls, emails, faxes and your campaign calls.

- **AgenTel has been designed to be easy installable.**
- **AgenTel is a very flexible and open solution; no matter how your business changes, you can be sure that agenTel can keep up!**
- **AgenTel's license model and extensive features make sure that you get value for money!**

AgenTel is aimed at helping companies achieve a high degree of quality in customer interaction and develop and manage profitable customer relationships over time. When receiving a new contact (call,email or fax) the agent immediately gets all the information related to the contact and the customer to who it belongs (CRM integration). In this way, agenTel improves your relationship with your customers by giving a faster response by the right person, automated self-service with voice mail and database query possibilities even when calling during non-office hours, providing a 24h service.

AgenTel's built-in statistical reports allow you to get a better insight of your customer interactions allowing you to maximize performance and detect bottlenecks.

How agenTel works



AgenTel can be divided into the server software installed on the central agenTel server, and the client software installed on the computers of the agents, team leaders and administrator.

AGENTEL'S SERVER SOFTWARE

For small systems, all server components are installed on the same computer, while for larger systems the different components can be installed on different computers and can even be made redundant (for high availability reasons).

- *CTI Software*

  Is responsible for keeping track of the telephone activities of the agents. It detects if an agent is calling and therefore prevents calls from being routed to agents already talking on the phone. The CTI Software requires a 3rd party TAPI link with the PBX.

- *IVR Software (Axxium)*

  Handles incoming calls, outgoing campaign calls and sending and receiving of faxes. It plays prompts, menus, asks for input, contains a voice-mail,… The IVR Software is connected with the PBX using ISDN (BRI, PRI), analogue telephony lines or VoIP.

- *Virtual Port Connector (VPC)*

  The purpose of the Virtual Port Connector (VPC) is routing calls without having an IVR (Axxium) installed (see above).

- *E-mail Routing Software*

  Is responsible for routing the emails to the agents.

- *Contact Center Software*

Gathers all the information of the other software components and makes the actual routing decision.

- *Database*

  Stores the agent profiles, statistical reports, contact codes,…

- *Wallboard*

  Displays a realtime overview such as : number of calls, number of agents logged in,…

AGENTEL'S CLIENT SOFTWARE

- *Client software*

  The agents have a telephone connected to the PBX and a computer running the agenTel Client software, which is linked over the network with the Contact Center Software. Using the agenTel client software, the agent:

  - gets a pop-up when a new call (direct, via the contact center or part of an outgoing campaign), email or fax arrives
  - controls his/her telephone via the computer using the "softphone"
  - sends faxes using the agenTel fax printer driver
  - accesses the "FAX Center" to search and look in the archived faxes
  - looks at faxes because they are displayed inside the agenTel client software (so no additional software is required)
  - gets an overview of the waiting contacts
  - "sees" the other agents.

  Note that the agent uses his/her normal e-mail client (e.g. MS Outlook) for receiving and answering emails. This ensures that agenTel is compatible with all e-mail clients!

  In addition, team leaders can access the "Campaign Center" via the agenTel client to manage outbound campaigns.

- *LAN wallboard*

  Displays realtime information (via a web browser) about the status of the contact center: number of agents free, number of emails waiting… In most cases the agents have a limited version of the LAN wallboard while the team leaders and administrators can see many more parameters.

- *Statistics software*

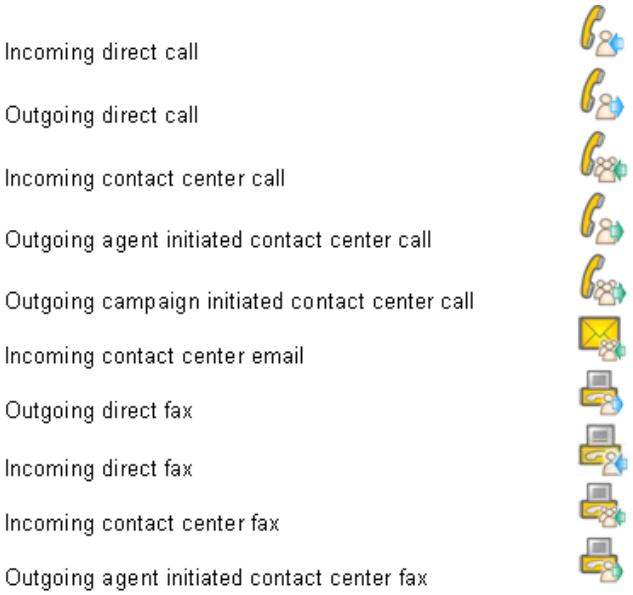
  The team leader uses the reporting software to extract statistical information out of the system, such as number of calls, number of emails, load on the agents…

- *Administration software*

  The administrator uses the administration software to manage the agents, skills, contact codes, pause reasons,… and defines the routing strategy.

Different type of “contacts”

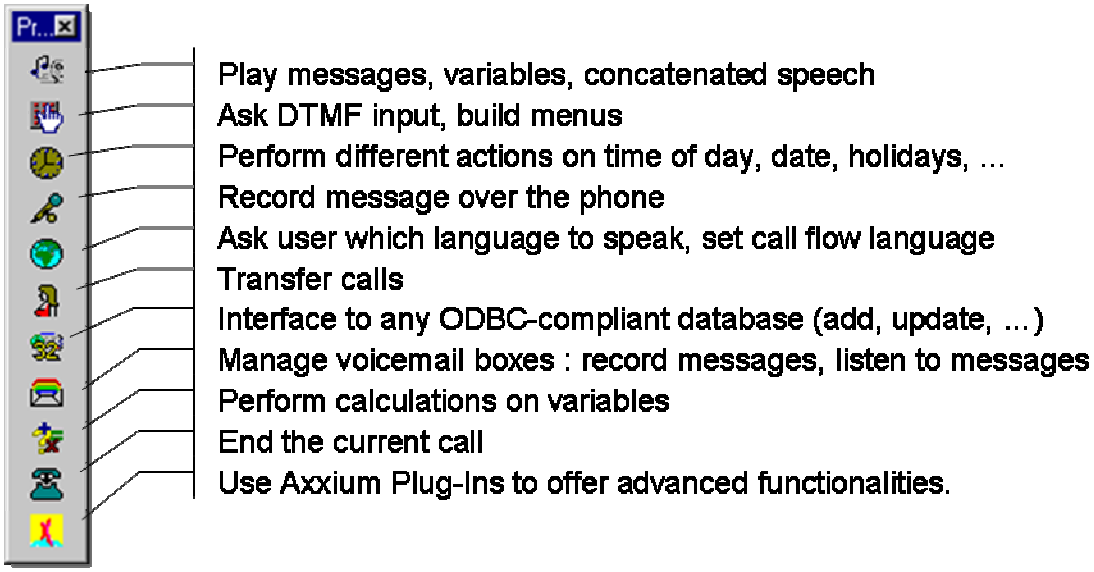
AgenTel routes calls, emails, faxes and outgoing campaign calls. Some of these types can even be further divided. In the picture below you can find all the contact types handled by the agenTel Contact Center.


Incoming direct call
Outgoing direct call
Incoming contact center call
Outgoing agent initiated contact center call
Outgoing campaign initiated contact center call
Incoming contact center email
Outgoing direct fax
Incoming direct fax
Incoming contact center fax
Outgoing agent initiated contact center fax

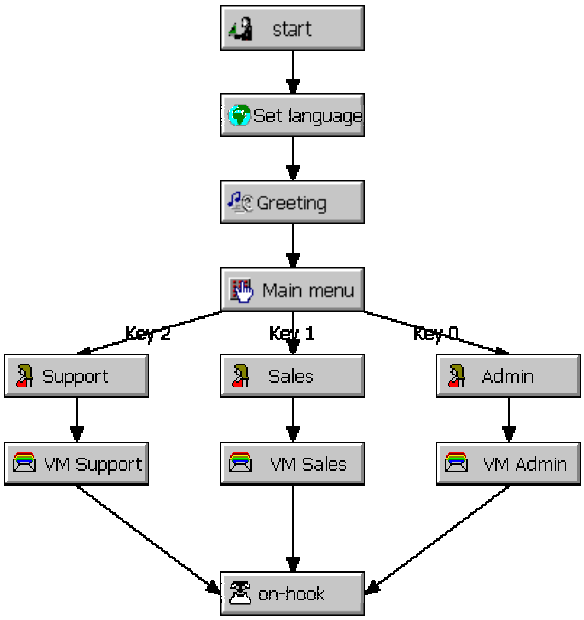
AgenTel’s IVR

AgenTel’s IVR is based on Axxium. Its key component is Voxtron's multi-awarded Graphical User Interface (GUI) for Rapid Application Development (RAD). Voxtron's GUI transforms the complexity of building telephony dialogues into a very user-friendly task. 11 intelligent icons complemented by the powerful Axxium Plug-In components lead to an unlimited variety of applications. The GUI enables changes in the dialogue flow, even by less technically inclined people.

A limited number of icons...


Play messages, variables, concatenated speech
Ask DTMF input, build menus
Perform different actions on time of day, date, holidays, ...
Record message over the phone
Ask user which language to speak, set call flow language
Transfer calls
Interface to any ODBC-compliant database (add, update, ...)
Manage voicemail boxes : record messages, listen to messages
Perform calculations on variables
End the current call
Use Axxium Plug-Ins to offer advanced functionalities.

... allow you to draw your own call flow:

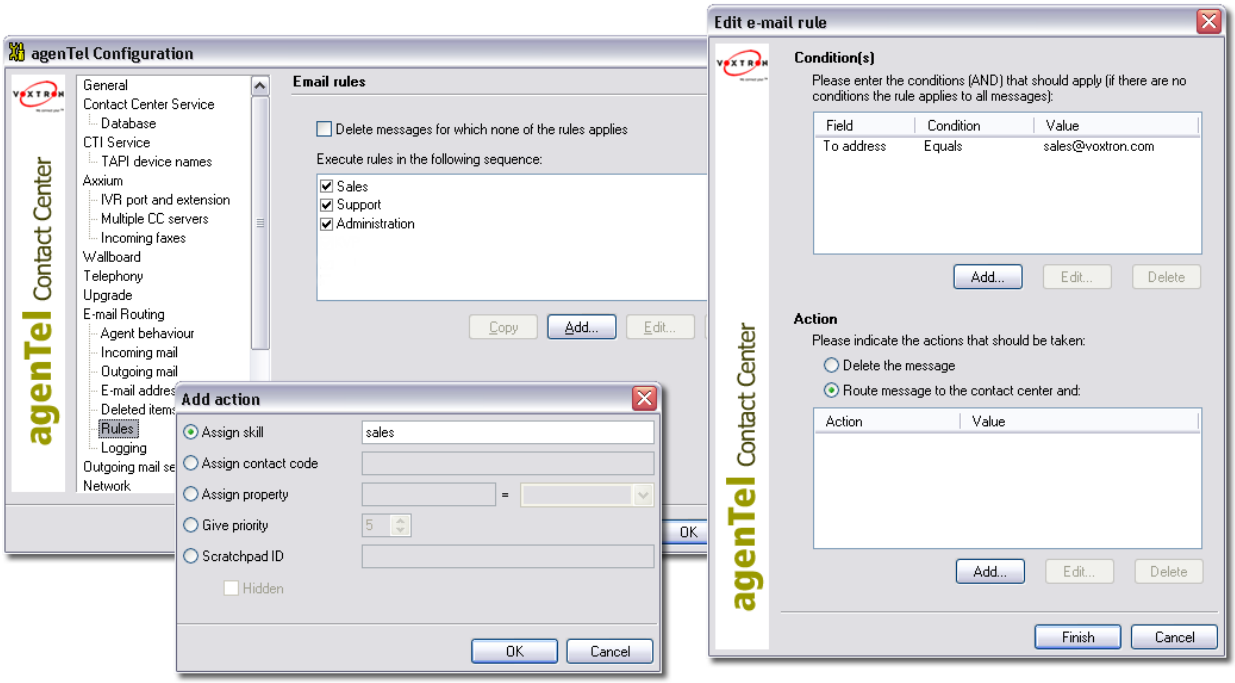


Other features include:

- Possibility to see you telephony traffic in realtime using the Runtime Screens
- Remote monitoring via SNMP (Simple Network Management Protocol)
- Standard integration with ODBC-compatible database
- Conferencing capabilities
- Speech Recognition capabilities
- …and much, much more!

agenTel's e-mail rules

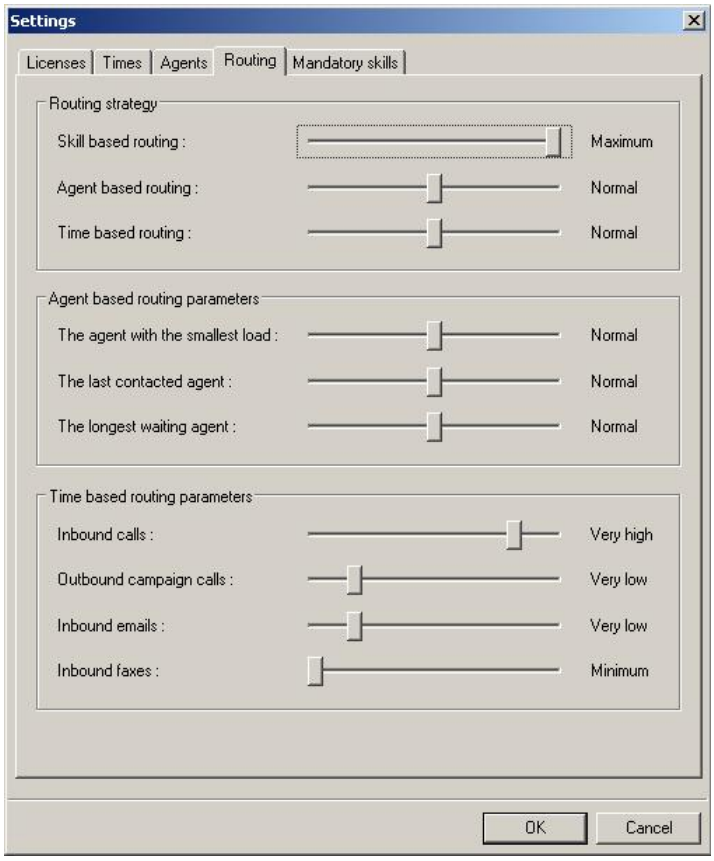
AgenTel includes an e-mail rules engine that allows the administrator to assign skills, contact codes, data and priorities to emails based on different criteria, such as TO, CC, Subject,…



AgenTel's Routing

Routing is the most important feature of good contact center software. Orders can be lost since customers don't accept having to wait too long. Existing customers will be displeased if their contact (call, email or fax) is routed to the wrong agent, who for instance doesn't speak the right language. For outgoing campaign calls, this is even more important, because when you call somebody, it is simply unacceptable that you have to wait!

AgenTel uses 3 techniques for routing calls:



- Skill *Based Routing*

a contact is routed to an available agent that best matches the required skills for this particular contact.

- For inbound calls, skills are assigned in the IVR via menus ("For French, press1","For English, press 2"), or by dialing a specific telephone number (e.g. number for French and number for English).
- For emails, skills are assigned based on the properties of the email (to, from, subject). E.g. mails sent to sales@company.com get skill "Sales".
- For incoming faxes, skills are assigned in the IVR mainly based on the dialed fax number.
- For outgoing campaign calls, skills can be assigned on a campaign base, or they can vary for each contact to dial (e.g. language).

- Time based routing

The longer a contact waits, the more chance of being transferred to an agent that becomes free.

- Agent based routing

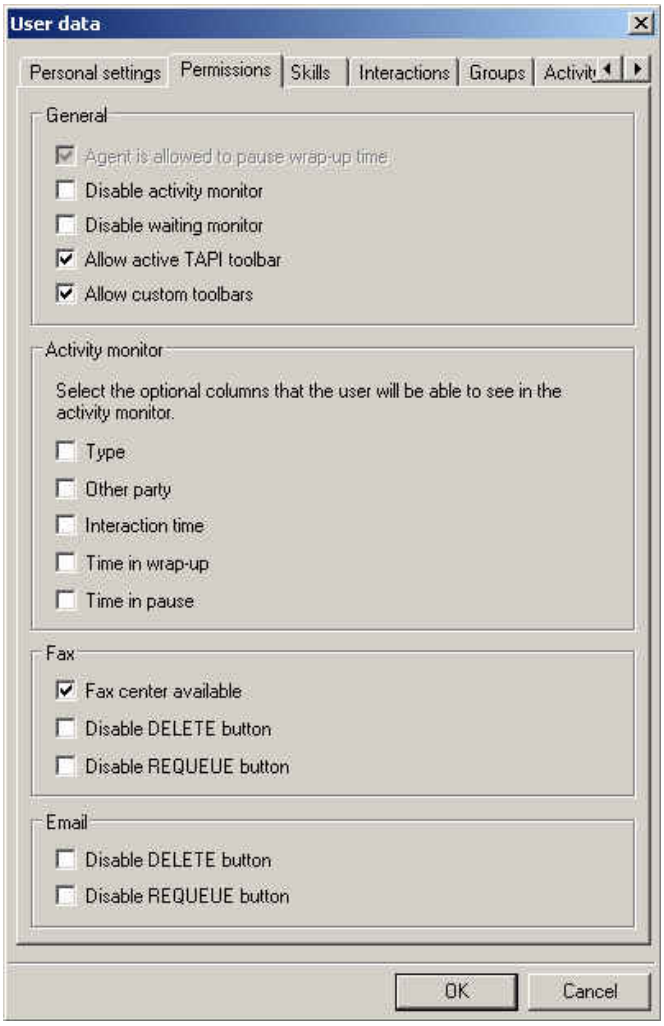
- Customers who contact you multiple times, have a higher chance to be routed to the same agent.
- Agents that have not had a contact a long time, have a higher chance of being selected.
- Agents that have had few contacts, have a higher chance of being selected.

In addition, the priority between calls, e-mails, faxes and outbound campaign calls is also a crucial factor for a contact center and can be easily configured in agenTel.

AgenTel's administration and configuration

AGENTS

All contacts are routed to individual agents, each agent is configured in the system with different parameters:



- *The agent skills*

  A skill is always assigned with a certain skill knowledge value; a measurement on how well the agent possesses this skill.

- *The group(s) to which the agent belongs*

  An agent inherits the skills given to the groups he/she is assigned to.

- *The wrap-up time*

  This is the time that the agent has after a contact is finished and before a new contact is routed to him/her. The wrap-up time can be individually specified allowing more time for e.g. less experienced agents.

- *Allowed contact types*

  Whether the agent is allowed to handle calls, emails, faxes,… or, whether or not the agent can select this for him/herself at login-time.

- *Visible agents in the agent monitor*

  Whether the agent sees all other agents, only the agents from his/her group… in the agent monitor.

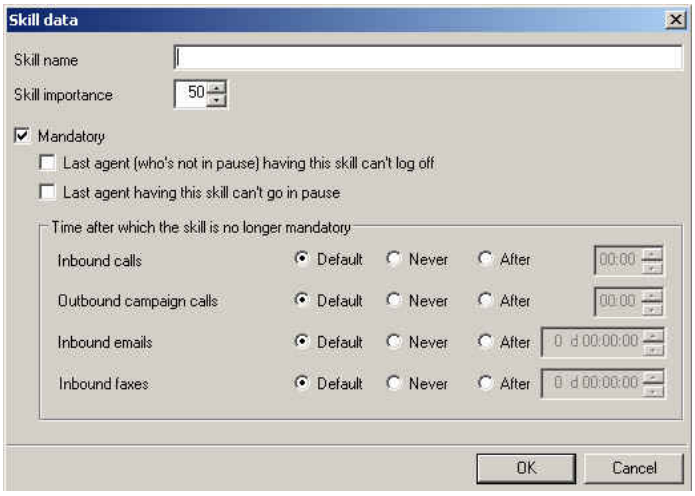
- *Permissions*

  The administrator can also define certain permissions for the agent, denying the agent access to what is sometimes regarded as sensitive information (such as the phone number that other agents are talking with …).

SKILLS

The principal routing mechanism of agenTel is skill based routing. When setting up the contact center, the administrator has to create the different skills (all contacts share the same set of skills).

These skills can for example be the knowledge of languages, a specialization in certain products, technical, commercial, …

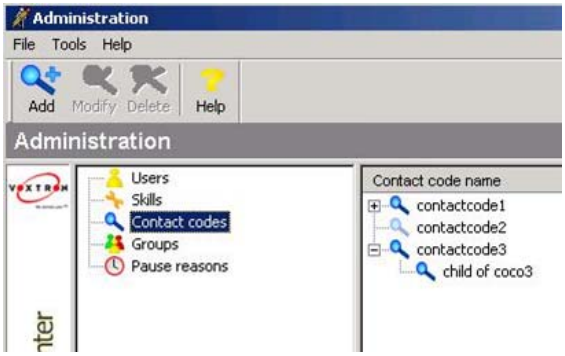


Each skill will get a name, a certain level of importance (skill importance) and can be marked as mandatory, meaning that contacts requiring this skill can only go to agents that possess it (remember, otherwise due to the time based routing it could not be the case!). This makes sure that for example English calls always go to agents that do speak English.

CONTACT CODES

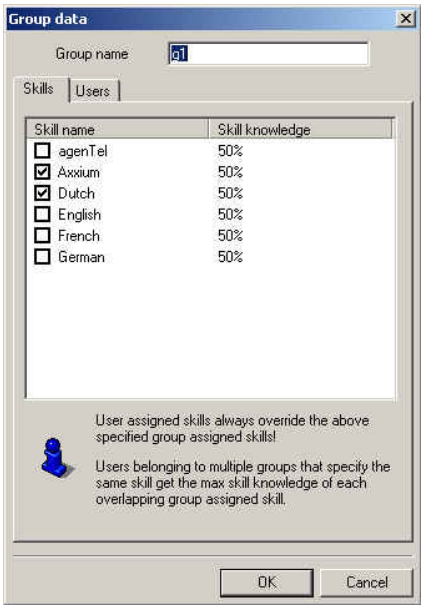
Contact Codes are yes/no markers that can be assigned:

- by the agent during the conversation and wrap-up time
- in the IVR
- in the e-mail rules engine



Their sole purpose is to divide the contacts into categories for statistical purposes later,
e.g. how many technical questions?

GROUPS

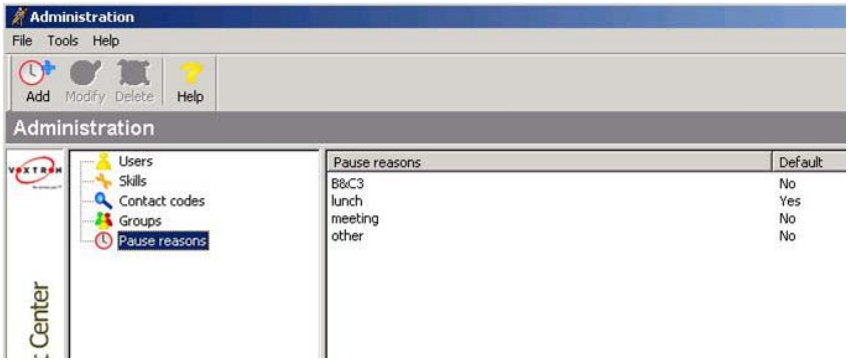


The main purpose of groups inside agenTel is to allow agents to inherit the group-assigned skills. This provides an easy way to organize the different agents inside the contact center.

Instead of assigning all skills individually to an agent, an agent is placed in a group and gets the skills of that group.

Groups can also be used to define which other agents the agent will see in his/her agent monitor.

PAUSE REASONS



When an agent puts him/herself in pause, he/she has to assign a pause reason. The pause reasons can be defined by the administrator and they are useful for extracting statistical reports; e.g. how many time spent on “Meeting”?

AgenTel’s agent client software

MINIMAL DESKTOP USAGE

The agent software has been designed to consume hardly any desktop space. This allows the agent, to use/her his entire desktop while still:

- being notified of new contacts (calls, emails, faxes) and important contact center events (e.g. callers have to wait to long)
- having access to the agent productivity features, such as the possibility to dial any number (from inside any application!) by pressing e.g. F11

LOGIN

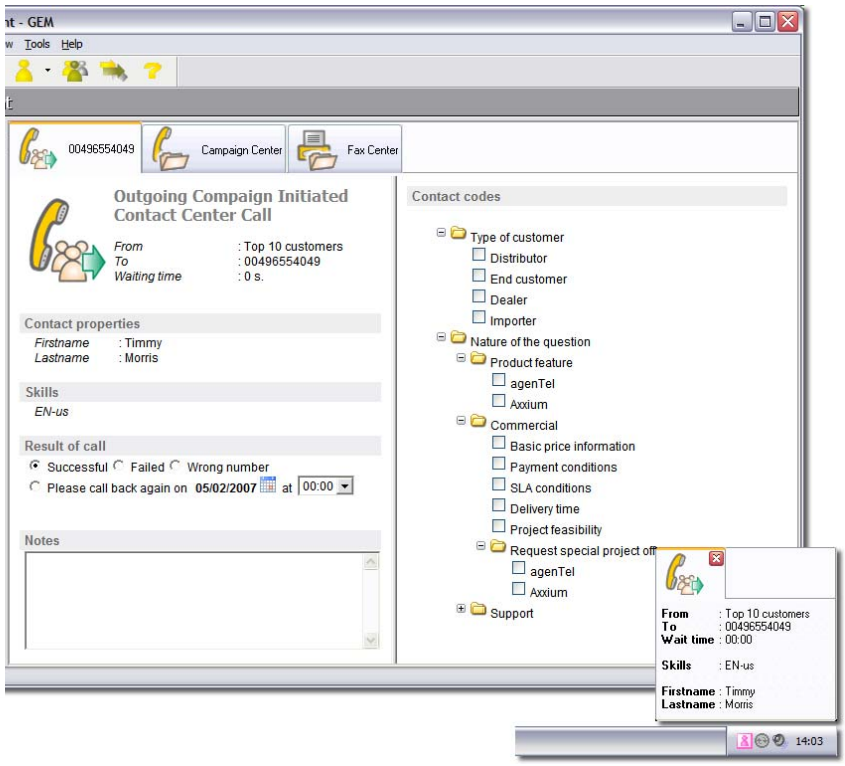
AgenTel supports PC-based agents and PC-less agents. PC-less agents can log on via the telephone or the team leader can manually log them on.

PC-based agents use the agenTel client software:

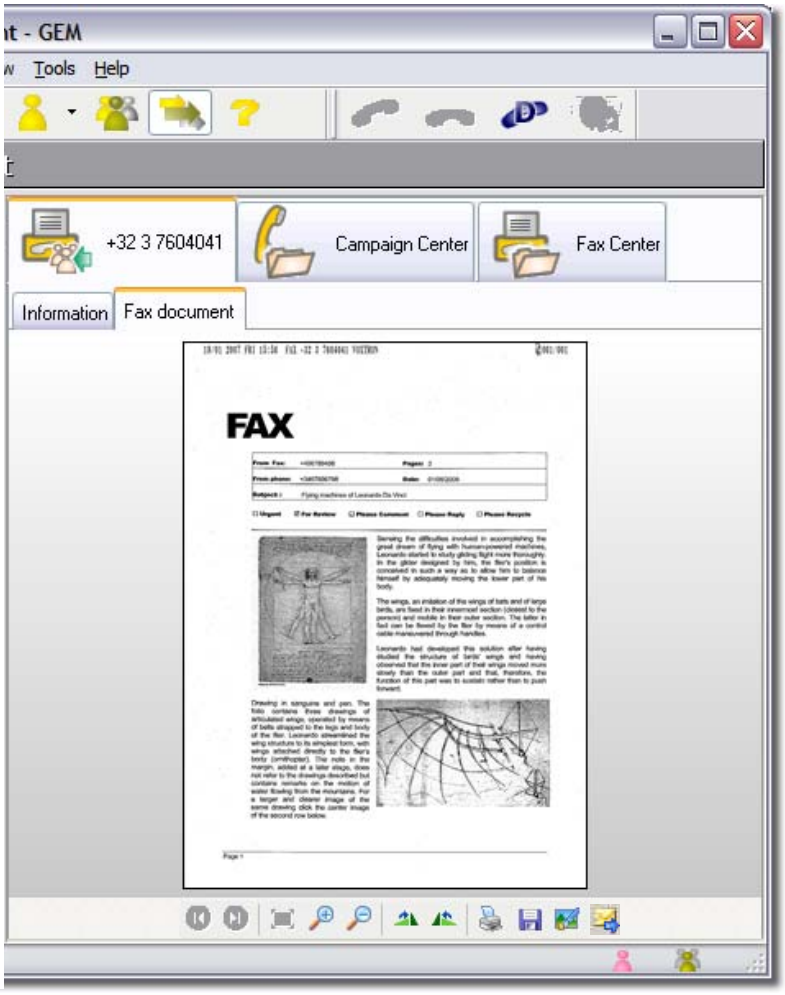
- Agent enters his/her user name and password. The agent can also select the language for the agent client application (more than 10 languages supported!).
- Based on the agent's profile (configured by the administrator), the agent can optionally select if he/she wants to be available for handling emails, calls,… If you do not select any of the contact types, but fill in the Extension edit box, you will be logged on as an OfficeClient®.
  This involves that you will have no contact center contact types and that only direct calls and direct faxes will be allowed. This will be visible in the left pane of your Client window, visualizing that you are an OfficeClient®. If you do however select any kind of contact center contact type, the left pane of your Client window will show AgentClient™.
- AgenTel allows 'free-seating': if the agent is available for handling calls, he/she has to enter the extension.

POPUP

Once a PC-based agent is logged in, he/she will get a popup screen when a new contact arrives.



The popup screen displays the details about the call (dialed number, wait time), e-mail (from, to, wait time), fax (sender id, wait time) and campaign call (for which campaign, number,…) and its skills and other related data.

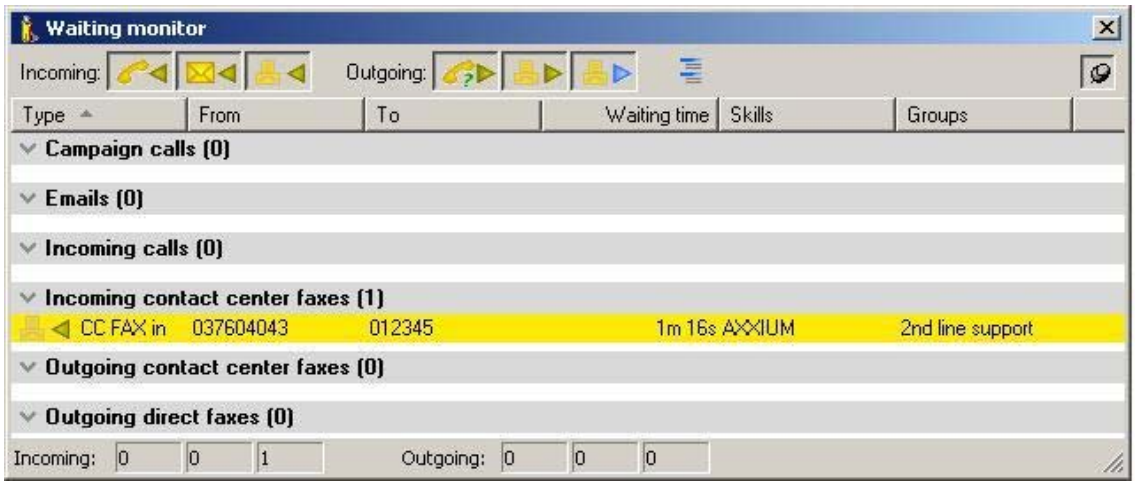


A scratchpad area in the left side of the popup window, allows the agent to quickly make some notes.

The right side of the screen contains the contact codes ready to be assigned by the agent.

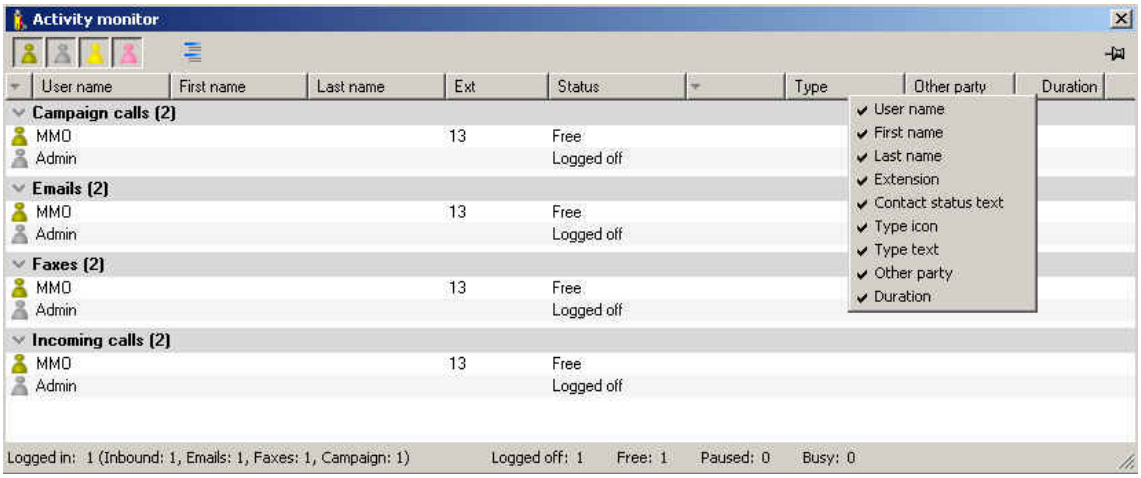
When receiving a fax, the fax is displayed inside the client window.

WAITING MONITOR



The waiting monitor gives the agent an overview of the calls, emails and faxes currently waiting in the contact center with their individual waiting times. A team leader can, when he/she notices that an important customer is waiting in the queue, manually assign the contact to a particular agent. When hovering over a waiting contact in the waiting monitor, all its details are displayed (skills, contact properties,…).

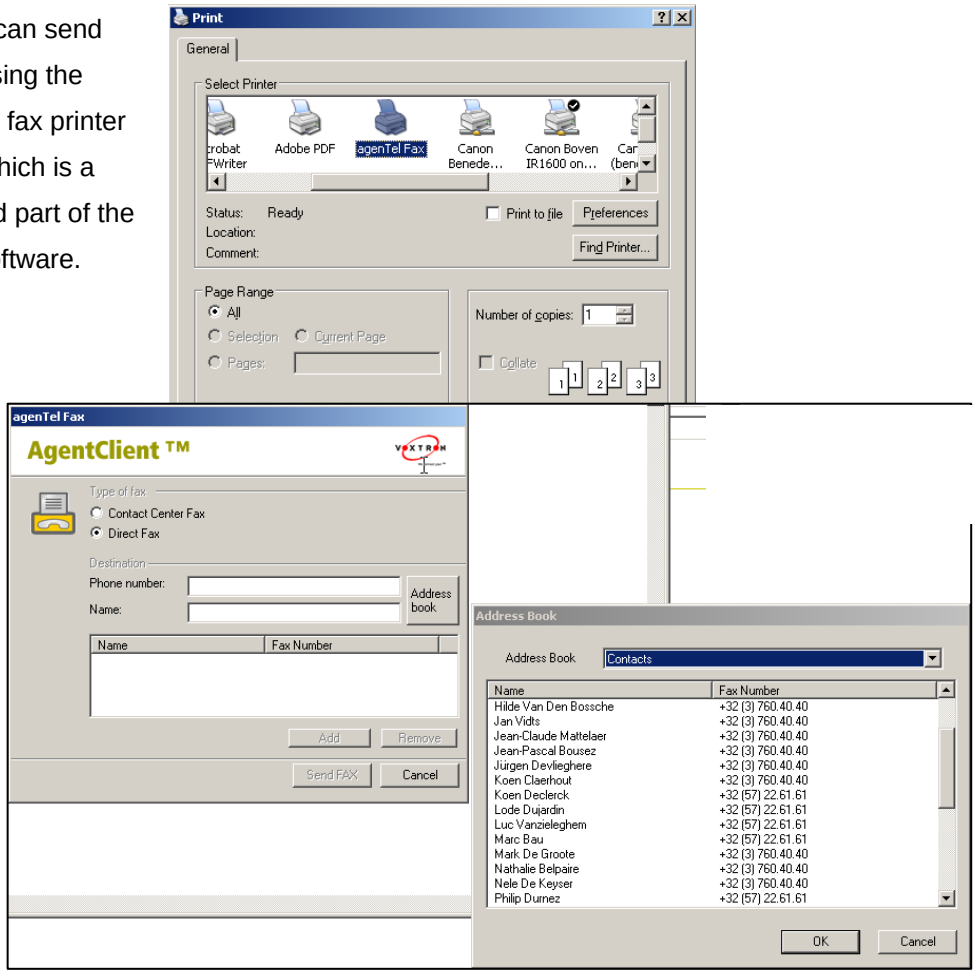
ACTIVITY MONITOR



The activity monitor gives the agent an overview of the agents in the contact center and their status: free (available to take a call), busy (on the phone), paused. A team leader can change the status of a particular agent: he/she can force the agent to log on or change his/her status from ‘Paused’ to ‘Available’. When hovering over an agent in the activity monitor, all agent details are displayed (skills, name,…).

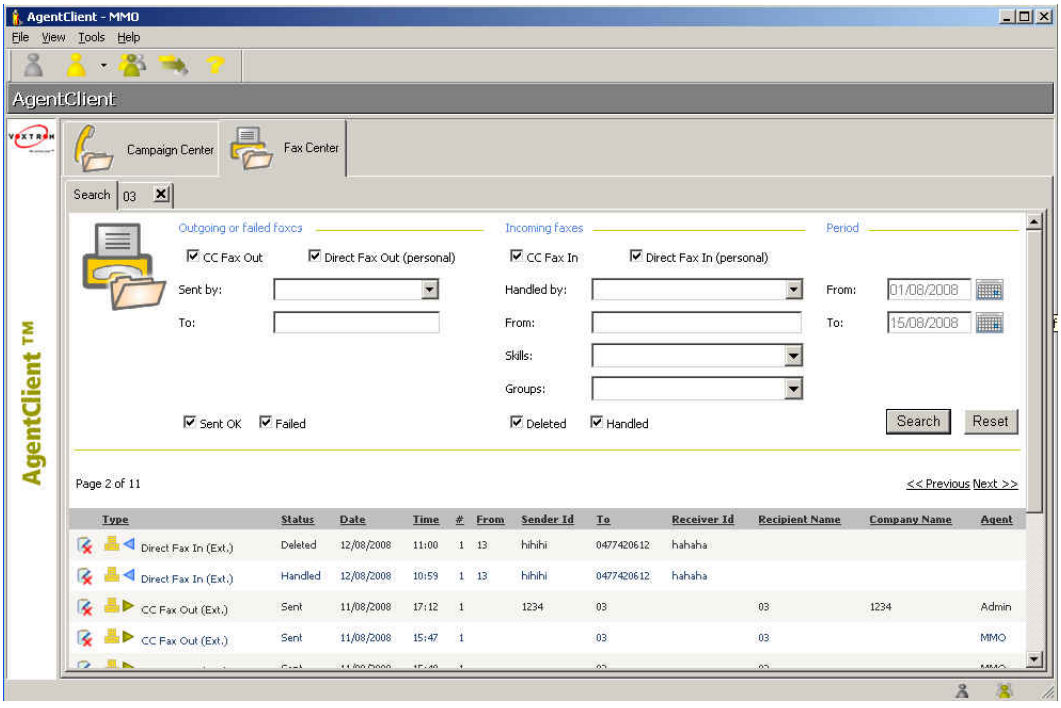
FAX PRINTER DRIVER

Agents can send faxes using the agenTel fax printer driver which is a standard part of the client software.



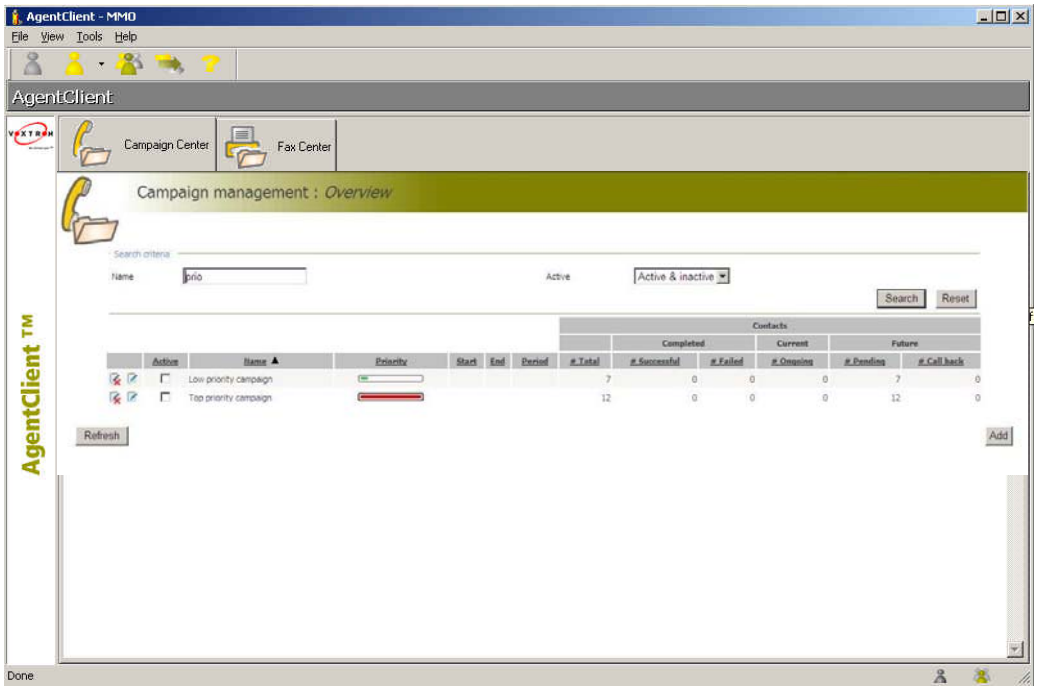
AGENTEL'S FAX CENTER

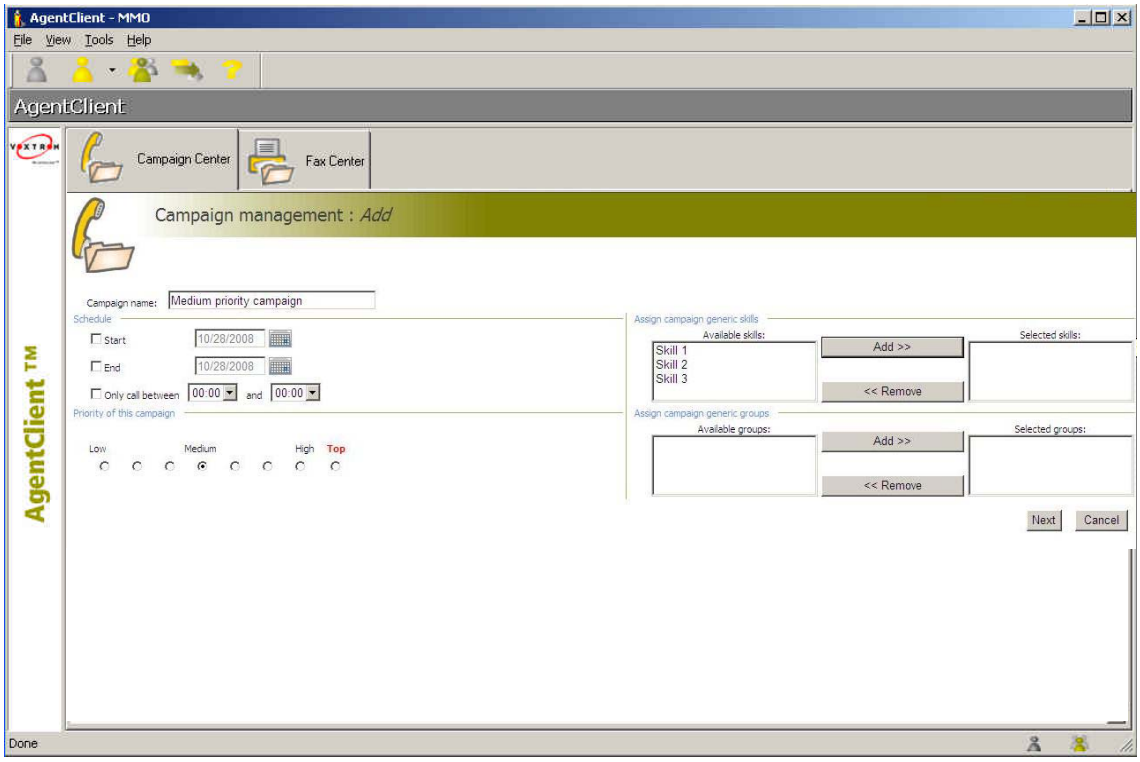
AgenTel archives all sent and received faxes (exept those marked as private). The FAX Center provides the agent an easy to use interface for searching the archive and looking at archived faxes.



AGENTEL'S CAMPAIGN CENTER

Team leaders can manage campaigns via the Campaign Center. Campaigns are created by importing .csv files that contain the details of the contacts to dial (phone number, skills,…). Each campaign has its own schedule, priority, skills,…

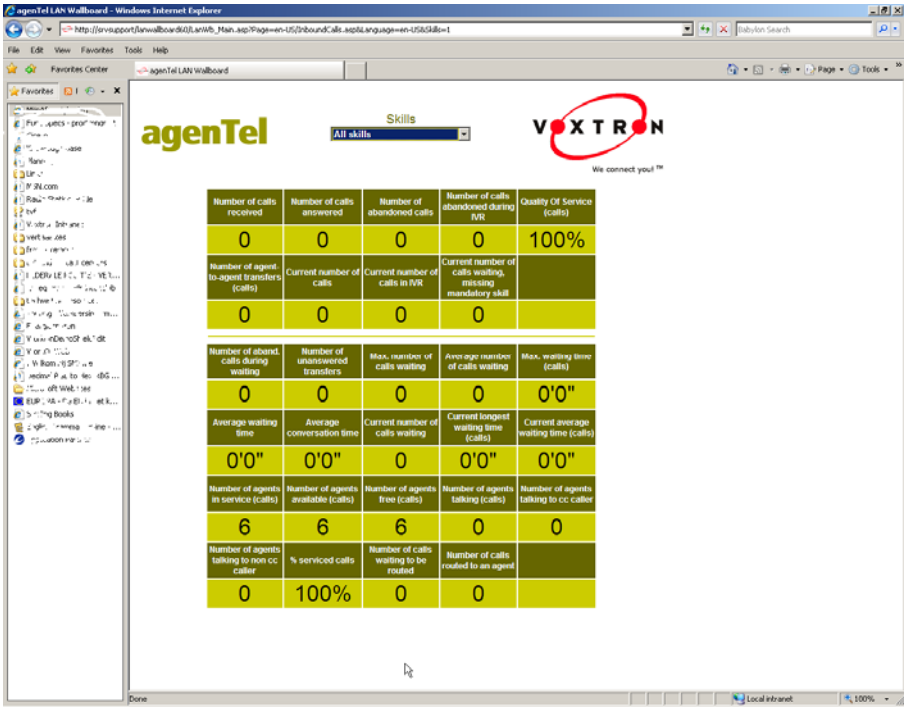




AgenTel's wallboard capabilities

AgenTel supports LAN wallboards (viewed on a computer through a standard web browser).

AgenTel supports many parameters that can be displayed: number of calls received, average waiting time, quality of service, …
Many of the parameters can be visualized per skill; e.g. number of waiting calls for English.



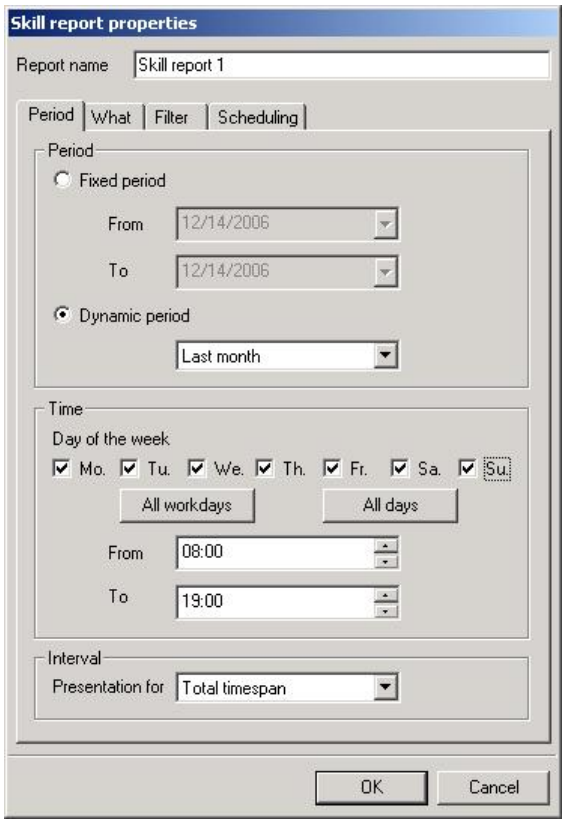
Most of the time, the agents have a limited version of the wallboard while the team leader and administrator can see all available parameters.

In addition, it is possible to define thresholds that allow changing the color of the parameters depending on their value e.g. QOS > 90% = green, QOS < 90% = red.

AgenTel's reporting capabilities

Once a contact center is installed, it is important to measure its load, effectiveness and performance. For this reason, agenTel is equipped with a statistical program, accessible by the team leader.

AgenTel's statistics can be viewed in realtime; they are just a mouse-click away!



6 categories of statistical reports are available:

- ❑ Skill reports
- ❑ Agent reports
- ❑ Contact Code reports
- ❑ General reports
- ❑ Login reports
- ❑ Custom reports

Resulting in over 50 different reports!

For some cases, where the customer requires statistical reports not standard available, custom-made statistics can be implemented that integrate seamlessly in the agenTel environment. These reports can include non-CC data, e.g. from your infrastructure, and therefore offer a complete view on your solution.

Report

Report name	Pauses of GEM
Report type	Agent reports

Agent	Year	Week	Agent activity					
			Pause duration					
			Lunch [interval]	Meeting [interval]	Out of Office [interval]	Paperwork [interval]	Pauze [interval]	QA and testing [interval]
GEM	2006	48	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
GEM	2006	49	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
GEM	2006	50	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
GEM	2006	51	00:00:00	00:00:00	00:02:41	00:00:00	00:00:00	00:00:00
GEM	2006	52	00:00:00	02:32:53	00:00:00	00:00:00	00:00:00	00:00:00

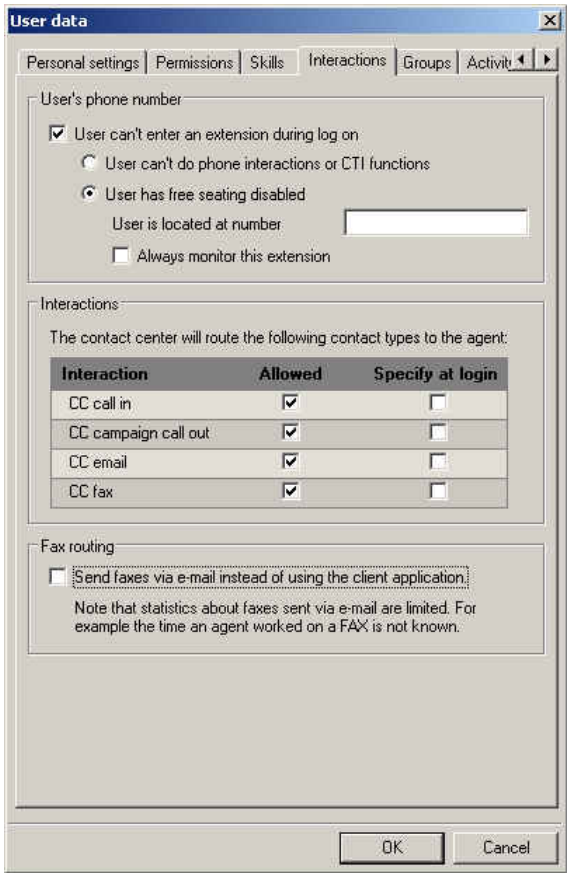
During creation of the statistical reports, different filters can be applied and the time interval (reoccurring, absolute) has to be set.

Reports can be exported as a comma separated (.csv) file to allow easy import in MS Excel or any other spread sheet program and they can be saved as HMTL files for later review.

Additionally, all statistical reports can be scheduled to be sent via email or saved to a folder.

Continously monitored extensions

The agenTel statistics contain values about calls that happen directly on the extension of the agent (so without going via the contact center).


User data
Personal settings
Permissions
Skills
Interactions
Groups
User's phone number
User can't enter an extension during log on
User can't do phone interactions or CTI functions
User has free seating disabled
User is located at number
Always monitor this extension
Interactions
The contact center will route the following contact types to the agent:
Interaction
Allowed
Specify at login
CC call in
CC campaign call out
CC email
CC fax
Fax routing
Send faxes via e-mail instead of using the client application
Note that statistics about faxes sent via e-mail are limited. For example the time an agent worked on a FAX is not known.
OK
Cancel

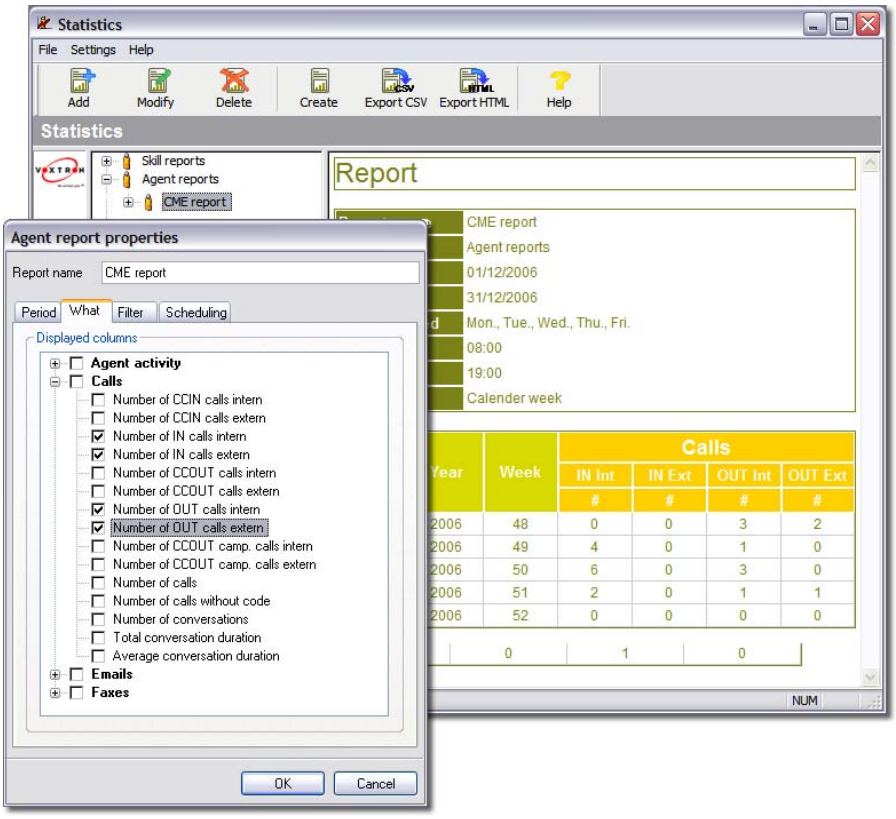
However, by default, agenTel only makes statistics when the agent is logged on to the contact center. This means that the e.g. number of incoming direct calls will only contain calls that happened during the time that the agent was logged on (with an extension) to the contact center.

AgenTel however, offers the possibility for an administrator to:

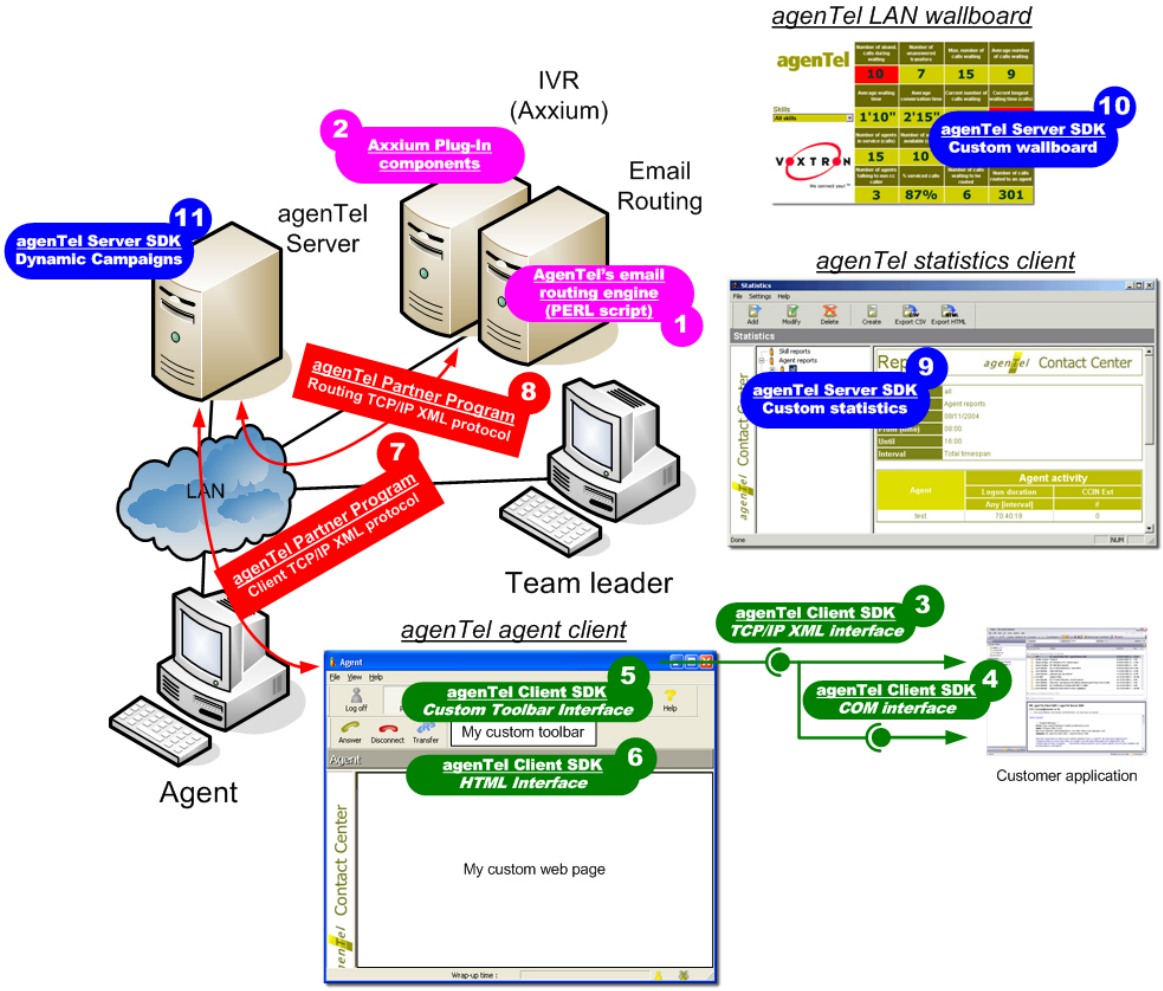
- disable the free seating of an agent, and by doing this hard-linking the agent to a certain extension (the agent cannot type in an extension anymore at login)
- specify that this extension must always be monitored

The result is that the statistics about calls that arrive directly or the extension of the agent, are always valid, independent o the agent logging on the contact center.

Note that the number of continously monitored extensions is subject to the license model of agenTel.



AgenTel is open and flexible



AgenTel has 11 integration possibilities:

INTEGRATION BY ASSIGNING CONTACT PROPERTIES (IN IVR AND E-MAIL ROUTING SERVER)

1 *Emails → integration via agenTel's e-mail rules engine*

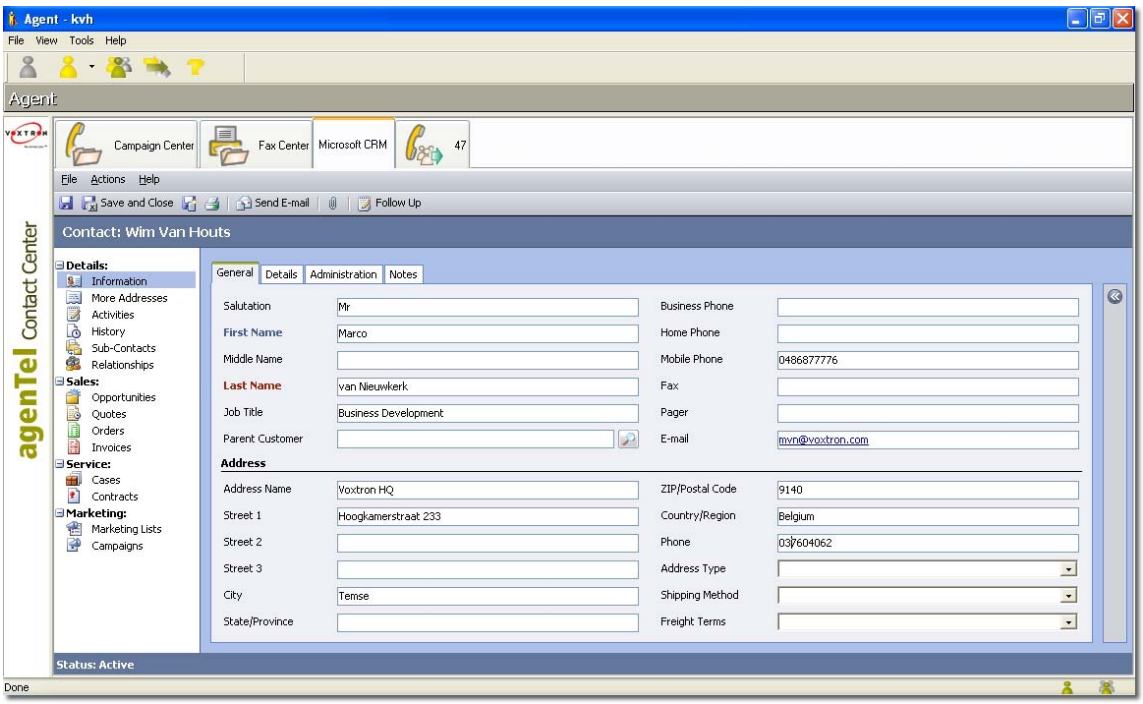
The built-in e-mail rules engine (wizard based or free PERL scripting) can attach data in the form of contact properties to an email. These contact properties are displayed on the agent's screen or can then be used by a client integration (see below).

2 *Telephony calls → Integration via agenTel's built-in IVR (or Virtual Port Connector (VPC))*

The built-in IVR (Voxtron's Axxium) can retrieve data from an external server, database,… E.g. this can be done using the standard ODBC icon. The data is attached to the call in the form of contact properties. These contact properties are displayed on the agent's screen or can then be used by a client integration (see below).

INTEGRATION OF THE AGENT CLIENT → AGENTEL CLIENT SDK

Using the agenTel Client SDK, the agenTel Client can be easily integrated with your existing (CRM) software. The agenTel Client SDK is a software development kit for integrating the agenTel agent software with other 3rd party software. For example, the standard integration with Microsoft Outlook and Microsoft CRM 3.0 has been realized using the agenTel Client SDK:



The agenTel Client SDK offers the following interfaces:

3 *TCP/IP XML interface*

Communicate with the agent Client via a TCP/IP XML interface and retrieve all call/e-mail/fax properties,…

4 *COM Interface*

Communicate with the agent Client via COM interface and retrieve all call/email/fax properties,…

5 *Custom Toolbar Interface*

Possibility to insert your own (custom made) toolbar inside the agent client.

6 *HTML Interface*

Possibility to include your own tabs (HTML based) inside the agent client window.

THE AGENTEL PARTNER PROGRAM

7 *You can write your own agenTel Client via the "agenTel Partner Program"*

The standard agent client "speaks" with the contact center via a TCP/IP XML based protocol. If you sign in for the "agenTel Partner Program" (contains a non-disclosure clause and a number of support days), you will get this protocol and you are allowed to write your own agent client and/or embed it fully into your own agent desktop application.

Of course, this requires a high degree of technical programming knowledge.

8 *You can integrate your own IVR or E-mail Routing via the "agenTel Partner Program"*

AgenTel's IVR and E-mail Routing Server "speaks" with the contact center via a TCP/IP XML based protocol. If you sign in for the "agenTel Partner Program" (contains a non-disclosure clause and a number of days support), you will get this protocol and you are allowed to integrate your own IVR or e-mail routing server.
Of course, this requires a high degree of technical programming knowledge.

THE AGENTEL SERVER SDK

9 *Implementation of custom statistical reports via the agenTel Server SDK*

The agenTel Server SDK allows custom made statistics to be plugged in into the standard statistics software. Custom made statistics can be integrated with external databases to e.g. display the name of the caller instead of his/her number (fetched from an external database containing caller name and number).

10 *Implementation of custom wallboard via the agenTel Server SDK*

The agenTel Server SDK allows custom made LAN wallboard web pages to be built, that e.g. only display the wallboard parameters that you are interested in, use your company logo, your layout,…

11 *Implementation of dynamic campaigns via the agenTel Server SDK*

The agenTel Server SDK allows custom made dynamic campaigns to be designed to your particular needs,…

High availability configurations

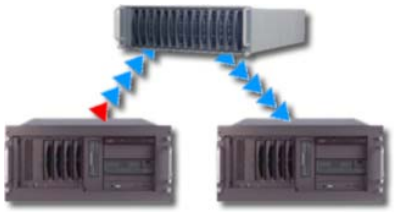
COLD STAND-BY

Single server with regular backups

- ❑ Standby machine is switched off
- ❑ Regular backups are taken from active machine
- ❑ On failure, active machine is replaced by standby machine and latest backup is restored

HOT STAND-BY

Cluster



- ❑ Both servers are running and data is kept central
- ❑ No loss of data
- ❑ ± 1 minute downtime when switching
- ❑ Requires Win2003 domain
- ❑ 99.999% uptime (HW)

agenTel's license model

All licenses are concurrent

IVR PORTS

Number of channels used to connect the IVR to your PBX

OFFICE CLIENT LICENSES

Mandatory for each agent, it contains:

- ❑ *Possibility to log on, use softphone (active TAPI toolbar)*
- ❑ *Use of waiting monitor*
- ❑ *Use of agent monitor*
- ❑ *Popup for direct calls (pure CTI)*
- ❑ *Direct Fax licenses: send/receive faxes*

INBOUND CALL LICENSES

Used by agent when logging on for incoming calls.

OUTBOUND CAMPAIGN LICENSES

Used by agent when logging on for campaign calls.

EMAIL LICENSES

Used by agent when logging on for email.

CONTINUOUS MONITORED EXTENSION LICENSES

See separate section in this document

FAXES

Only involves routing incoming faxes.

Requirements

SERVER SOFTWARE

- *Computer running:*
  - Windows 2003 (SP1 or later) / R2
  - Internet Explorer 6.0 or later
  - Network protocol TCP/IP
  - Microsoft Internet Information Services
  - Windows SNMP (Simple Network Management Protocol) if you want to monitor the IVR of agenTel using SNMP
- *CTI Software:*
  - 3rd party TAPI driver (v2.1)
  - Connection with the PBX, can be one of the following:
    - Serial port + serial cable (DB9/DB9 male/female) for communication with the PBX through the serial port
    - A network connection for communication with the PBX through LAN
    - A USB cable + port for communication with the PBX via USB
    - A D-channel or B-channel, using a BRI or PRI (for TAPI over CAPI 2.0)
- *E-mail routing:*
  - IMAP or POP server with accessible mailboxes (for receiving emails)
  - SMTP server (for sending emails)
- *FAX routing:*
  - The telephony board used by the IVR software should be capable of sending and receiving faxes
- *IVR Software:*
  - Telephony board:
    - Dialogic telephony board supported by Voxtron
    - If FAX routing, speech recognition (echo cancellation) or conferencing functions are required, the telephony board should support these
  - PBX / VoIP Gatekeeper

    The following features require that agenTel is placed behind a PBX / VoIP Gatekeeper and that the PBX / VoIP Gatekeeper itself supports the necessary protocols:
    - Call information: allows agenTel to differentiate between different types of calls such as: direct external call, direct internal call, diverted internal call, …
    - Message Waiting Indicator (MWI): allows agenTel to notify the user (via the telephone) that a new voice mail message has been received

- Single line transfer: allows agenTel to transfer a call without using “call tromboning”. This means that after the transfer, the telephony lines on agenTel are free to be used again.

- SMTP server for voice to email functionality

CLIENT SOFTWARE (CLIENT, ADMINISTRATION AND STATISTICS SOFTWARE)

- *Computer running:*
  - Windows XP (SP2 or later), Windows 2003 (SP1 or later) / R2 or Windows Vista™
  - Internet Explorer 6.0 or higher
  - Network protocol TCP/IP
- *For e-mail routing: any 3rd party e-mail client (e.g. MS Outlook, Eudora…) for receiving emails*
- *For inbound calls, outbound campaign calls and CTI integration : telephone (extension) monitorable via the TAPI link*

PC-LESS PHONE AGENTS

A telephone (extension) monitorable via the TAPI link

Note: Several (or all) components can be installed on the same computer. In that case, the requirements must be combined into one computer.

Deliverables

The agenTel DVD contains the following items:

- *Server software: CTI, Contact Center, IVR software, VPC software, e-mail routing software and database software*
- *Client software: agent, administration and statistics software*
- *Reference Manual (in Adobe Acrobat PDF format)*
- *User Manual (in Adobe Acrobat PDF format)*
- *AgenTel 6.1 Client SDK*
- *AgenTel 6.1 Server SDK*
- *Adobe Acrobat Reader 7.0*
- *Supported Dialogic telephony board drivers*

Additional services

In addition to delivering the software on DVD, Voxtron can also provide the following supplementary services (refer to your local sales organization for pricing):

- *Maintenance contract*
- *Installation and configuration of the system*
- *Integration of agenTel with 3rd party (CRM) software*

- *Integration of agenTel in your environment*
- *Implementation of custom statistical reports*